PCGENESIS PERSONNEL SYSTEM OPERATIONS GUIDE

| 8/12/2019 | Section C: Employee Contract File Export Processing, V1.5 |

Revision History

Date	Version	Description	Author
8/12/2019	1.5	19.02.00 – Update the *Procedure B: Creating the PCGenesis Contract Export File* screenshots.	D. Ochala
07/13/2015	1.4	15.02.00 – Update the *Personnel System Master Menu*.	D. Ochala
05/15/2013	1.3	Updated screenshots to PCGenesis Release 13.01.00 and Microsoft® Word/Excel 2007.	D. Ochala
03/31/2011	1.2	Updated document to PCGenesis Release 11.01.00 - Modified procedure and included new screenshot examples.	D. Ochala
02/07/2007	1.1	Changed document's cover page.	C. W. Jones
03/15/2004	1.0	Update document to PCGenesis Release 04.01.00	C. W. Jones

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Overview

This procedure is designed to aid you in producing contracts for *Certified* personnel. Certified employees' contract information exports from PCGenesis into a Microsoft® Excel spreadsheet, and allows the creation of employees' contracts using Microsoft® Word.

PCGenesis creates two blank contract forms in a Microsoft® Word file, which may be used to manually create a new or renewal employee's contract, or to print multiple copies of the blank forms, where appropriate.

The *Certified Employee Contract File Export/Printing Checklist* is included to aid you in completing this procedure.

Certified Employee Contract File Export/Printing Checklist

√	STEP	ACTION
	1	**OPTIONAL** – Print blank copies of the employee's contracts as needed.
	2	In the PCGenesis *Payroll* file, verify each employee's payroll information is correct.
	3	Create the PCGenesis *Contract* export file.
	4	Process the Microsoft® Excel *Contract.csv* file.
	5	Process the Microsoft® Word *Contract.doc* file.
	6	**OPTIONAL** – Add the appropriate fields to the Microsoft® Excel *Contract* file.

# *Procedure A: Printing Blank Copies of the Employee's Contract - OPTIONAL*
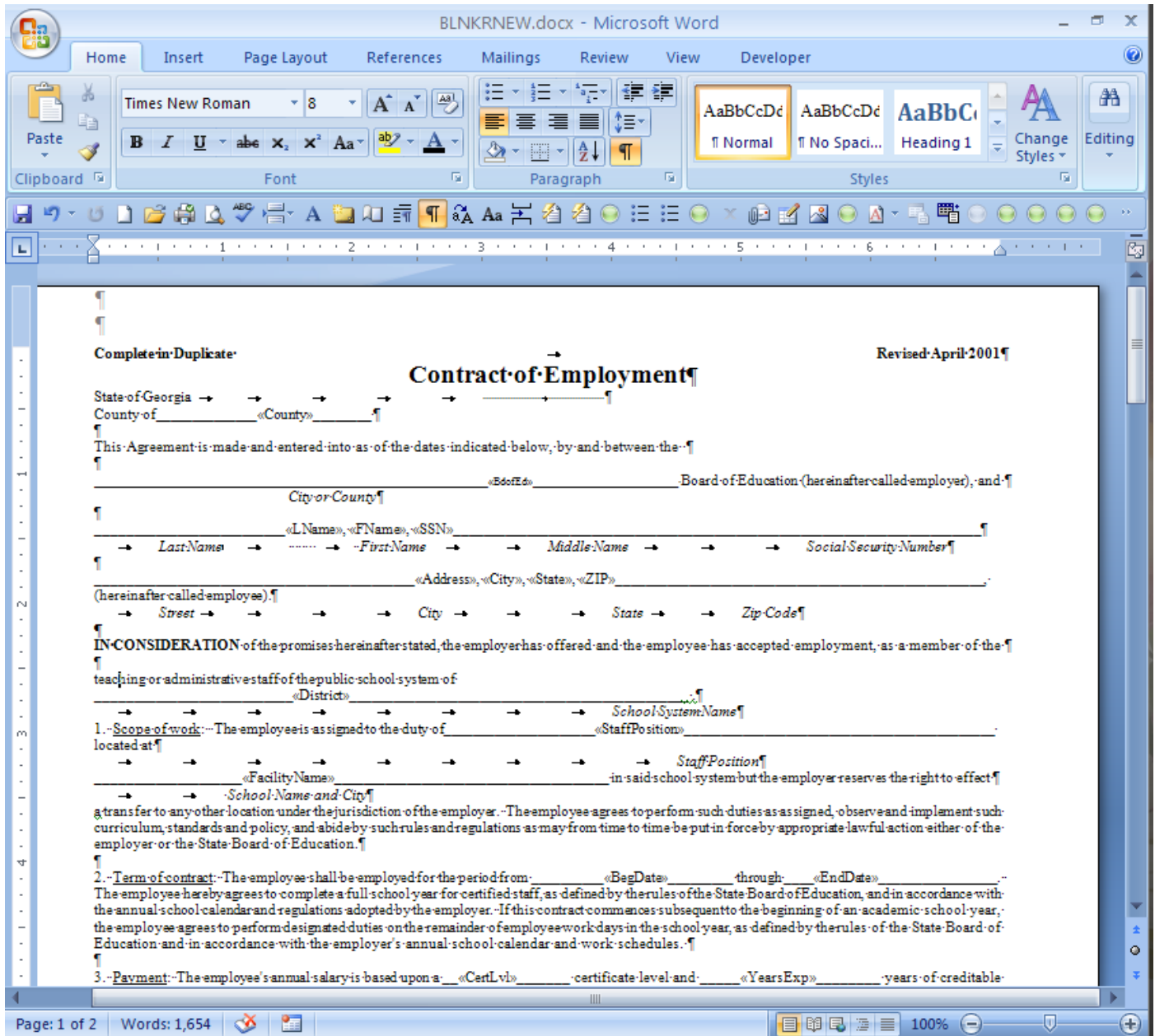
Step	Action
1	Using Microsoft® Word, open the **BLNKNEW.doc** or **BLNKRNEW.doc** file on **K:\SECOND\PERDATA**.
2	Print the appropriate number of copies.

Procedure B: Creating the PCGenesis Contract Export File

Step	Action
1	From the *Business Applications Master Menu,* select ▸ 3 ▸ (**F3 -** Personnel System).

The following screen displays:
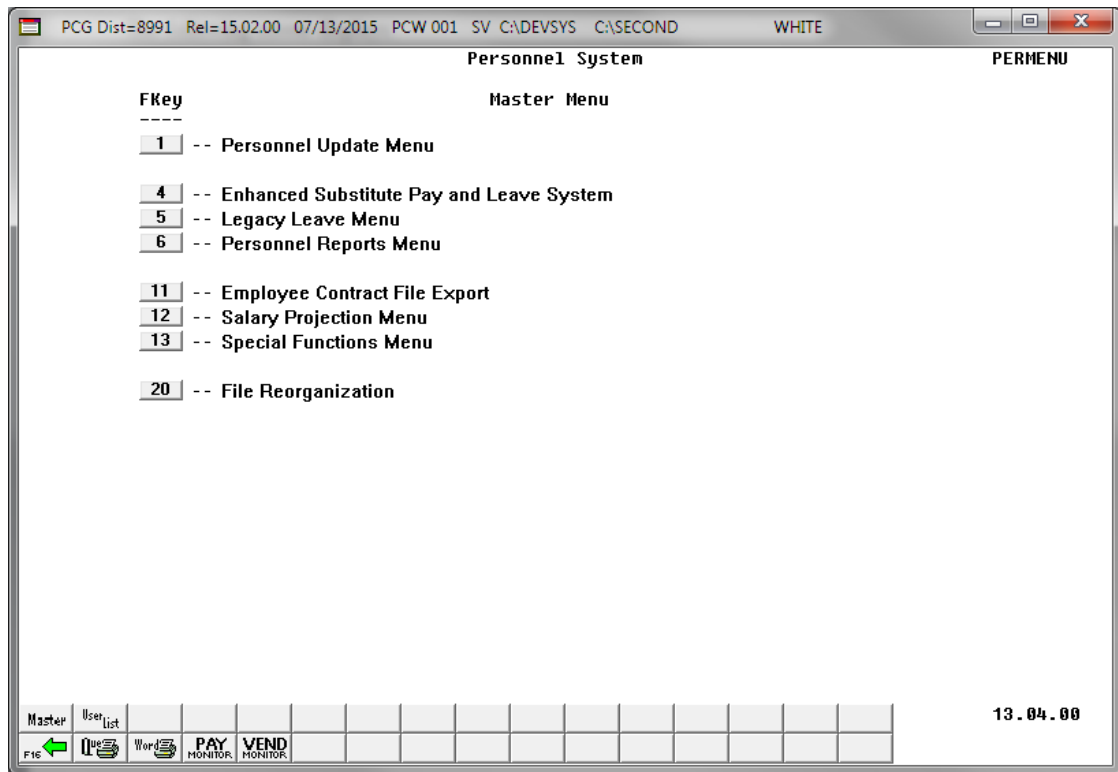
Step	Action
2	Select ▸ 11 ▸ (**F11 -** Employee Contract File Export).

The following screen displays:

```
┌─────────────────────────────────────────────────────────────────────────────┐
│ A  PCG Dist=8991  Rel=19.02.00  08/12/2019  PCG 001  SV C:\DEVSYS  C:\SECOND        WHITE       —   □   ✕ │
│                                                                                     PER11    │
│                           Create Contract Export File to Load in Excel                        │
│                                                                                               │
│                                                                                               │
│                             Please Verify or Modify the Following Information                  │
│                                  Which will Appear on Employee Contract                        │
│                                                                                               │
│                                                                                               │
│                     Board of Education:   SMITH CITY BOARD OF EDUCATION                        │
│                                                                                               │
│                     School System:        SMITH CITY BOARD OF EDUCATION                        │
│                                                                                               │
│                     County:               _____                            │
│                                                                                               │
│                     Salary Default:       X  User Must Input Salary in Excel                   │
│                                                                                               │
│                                                                                               │
│                     Input Date  (Optional)   MM DD Year                                        │
│                                 Begin Date   00 00 2019                                        │
│                                 End Date     00 00 2020                                        │
│                                                                                               │
│                                                                                               │
│                                                                                               │
│                                                                                               │
│                                                                                               │
│                                                                                               │
│          Enter = Continue,  F16 = Exit                                                         │
│  ENTER✓  ┌──┬──┬──┬──┬──┬──┬──┬──┬──┬──┬──┬──┬──┐                            19.02.00          │
│  F16 ←   └──┴──┴──┴──┴──┴──┴──┴──┴──┴──┴──┴──┴──┘                                              │
└─────────────────────────────────────────────────────────────────────────────┘
```
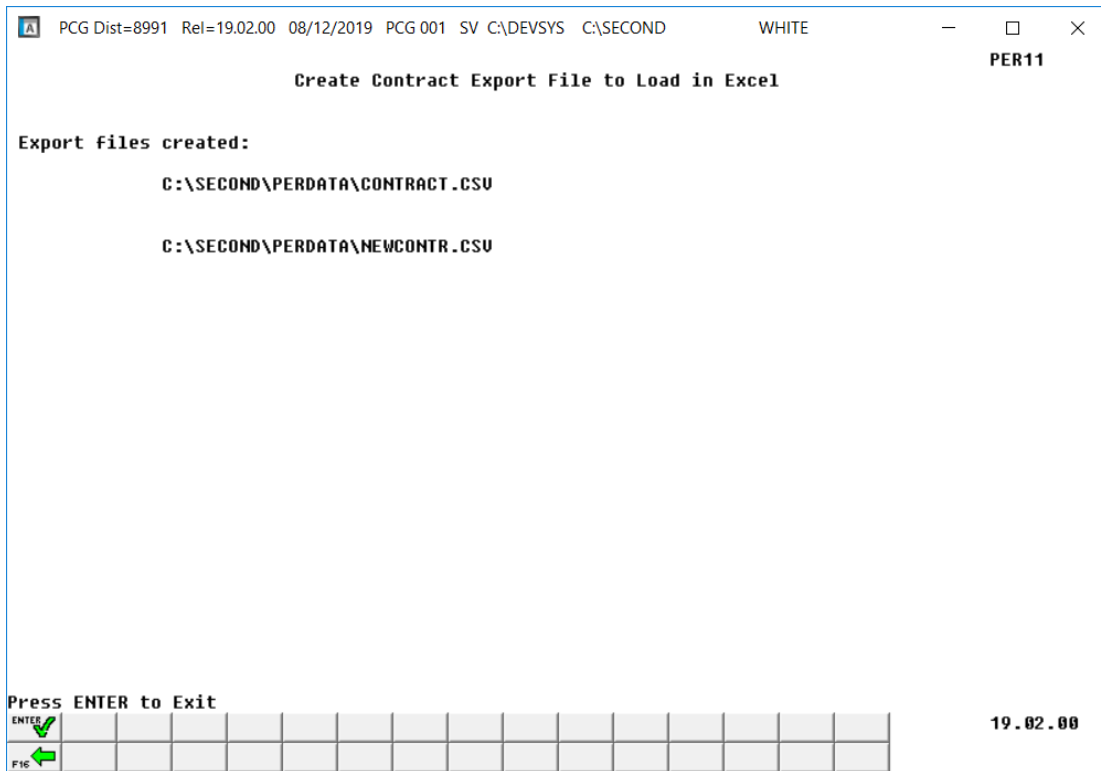
Step	Action
3	Verify the screen's entries in the **Board of Education** and **School System** fields.
4	Enter the county's name in the **County** field.
5	No entry is required in the **Salary Default: - User Must Input Salary in Excel** field. *Refer to the Certified/Classified Personnel Information (CPI) System Operations Guide, Section D: CPI Salary Schedule Processing for the instructions regarding uploading teaching salary information into PCGenesis.*
6	Enter the school district's contract salary date range (MM DD) in the **Begin Date** and **End Date** fields. *The information for the YYYY field reflects the current contract year. If you find that this entry is incorrect, contact Technology Management Customer Support immediately.*
7	Select ![ENTER] (**Enter**) twice. *"Processing Request" briefly displays.*

The following screen displays:

```
 A  PCG Dist=8991  Rel=19.02.00  08/12/2019  PCG 001  SV C:\DEVSYS  C:\SECOND        WHITE         —    □    ✕
                                                                                                PER11
                          Create Contract Export File to Load in Excel


    Export files created:

                   C:\SECOND\PERDATA\CONTRACT.CSV


                   C:\SECOND\PERDATA\NEWCONTR.CSV

















    Press ENTER to Exit
    ENTER ✔                                                                            19.02.00
    F16 ⬅
```

Step	Action
8	The **CONTRACT.csv** and **NEWCONTR.csv** will be created in **K:\SECOND\PERDATA**.
	• The **CONTRACT.csv** file includes existing employees' contract information which is exported from PCGenesis.
	• The **NEWCONTR.csv** file is a blank worksheet that allows for the manual entry of new employee information that does not exist already in PCGenesis.
	Proceed to *Procedure C*: *Microsoft® Excel Contract File Processing*.

Procedure C: Microsoft® Excel Contract File Processing

Step	Action
1	Using Windows® *Explorer* or Microsoft® Excel, open the **CONTRACT.csv** file. *The CONTRACT.csv file is located in K:\SECOND\PERDATA.*

The following window displays:
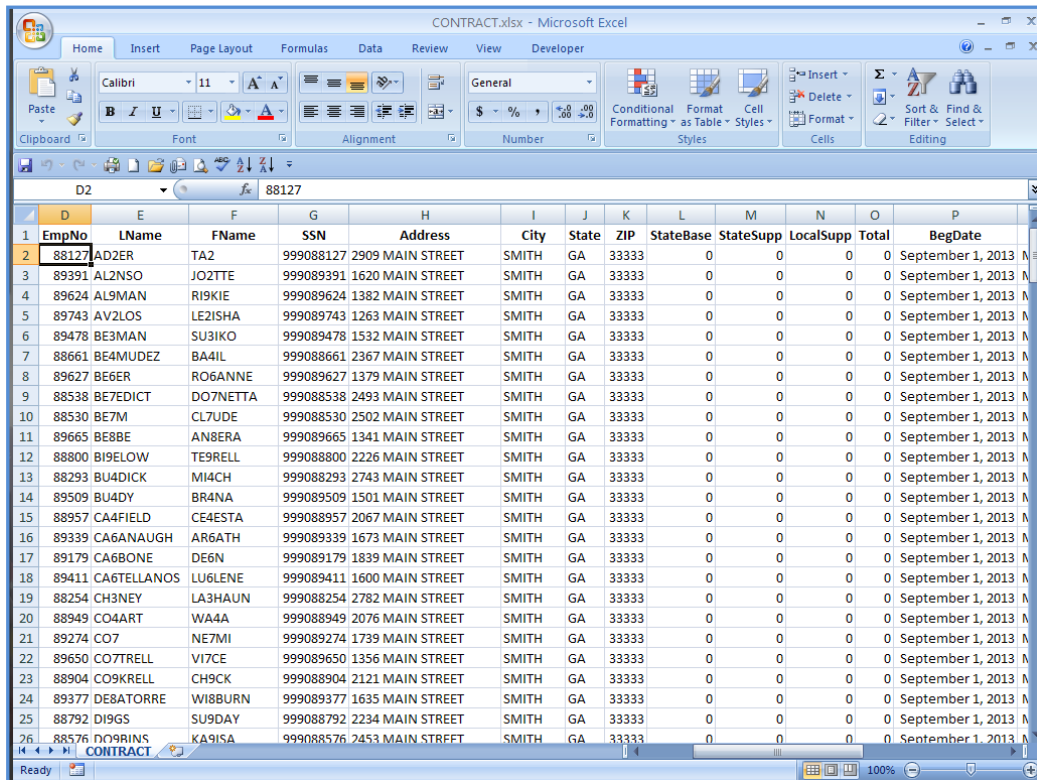
Step	Action
2	From the *Menu Bar,* select **File → Save As.** *The EMPNO is included for reference only and will not appear on the employees' contracts.*
3	Within the *Save As* dialog box, select the **Drop-Down selection** icon ⏷ in the **Save as type** field, and select **Microsoft Excel Worksheet (*.xls or *.xlsx).**
4	Verify the filename in the **File name** field is **CONTRACT.xls**, and select **Save** 💾 Save .
5	Select and highlight **Columns L** (StateBase), **M** (StateSupp)**, N** (LocalSupp) and **O** (Total).

The following window displays:

Step	Action
6	With the columns selected, right-click and select **Format Cells.**

The following dialog box displays:
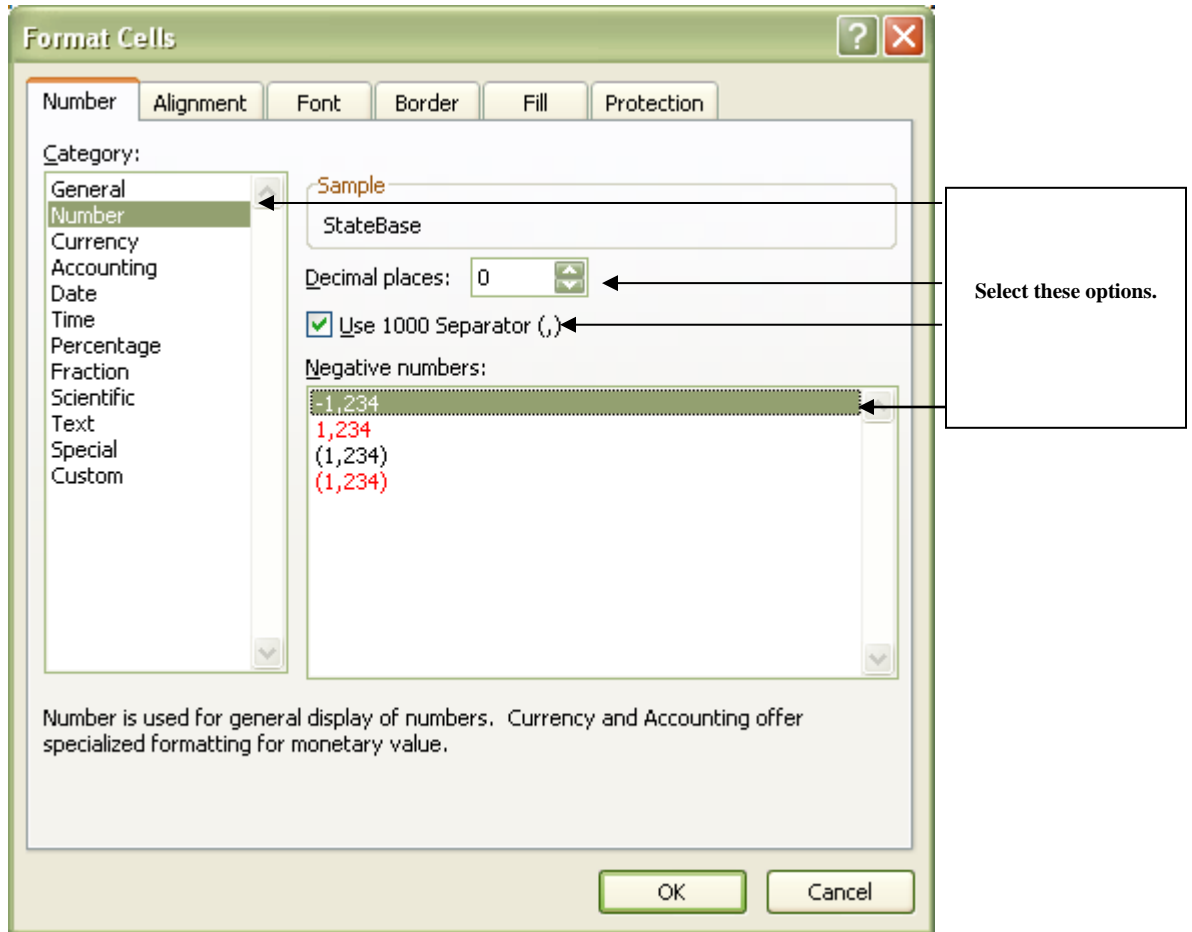
Step	Action
7	On the *Numbers* tab, select **Category: Number**, and the following criteria: • **Decimal Places: 0** • **Use 1000 Separator** ☑ • **Negative Numbers: -1234**
8	Select ___OK___ .(**OK).** *Dollar amount fields display without decimal places because of the Decimal Places: 0 selection in Step 7.*
9	Select <u>and</u> highlight **Columns P** (BegDate) and **Q** (EndDate).

The following window displays:

Step	Action
10	With the columns selected, right-click and select **Format Cells.**

The following window displays:

Step	Action
11	On the *Numbers* tab, select **Category:** Date, and within the **Type** area, select **March 14, YYYY** format, and ⬚ OK ⬚ (**OK**). *Your window may vary from the screenshot example above based on the Microsoft® Word version you are using. Select the Month DD, YYYY format.*
12	Within the *CONTRACT.xls/CONTRACT.xlsx* spreadsheet, select **Row 1.**
13	With the row selected, right-click, and select **Bold** ⬚ and **Center** ⬚.

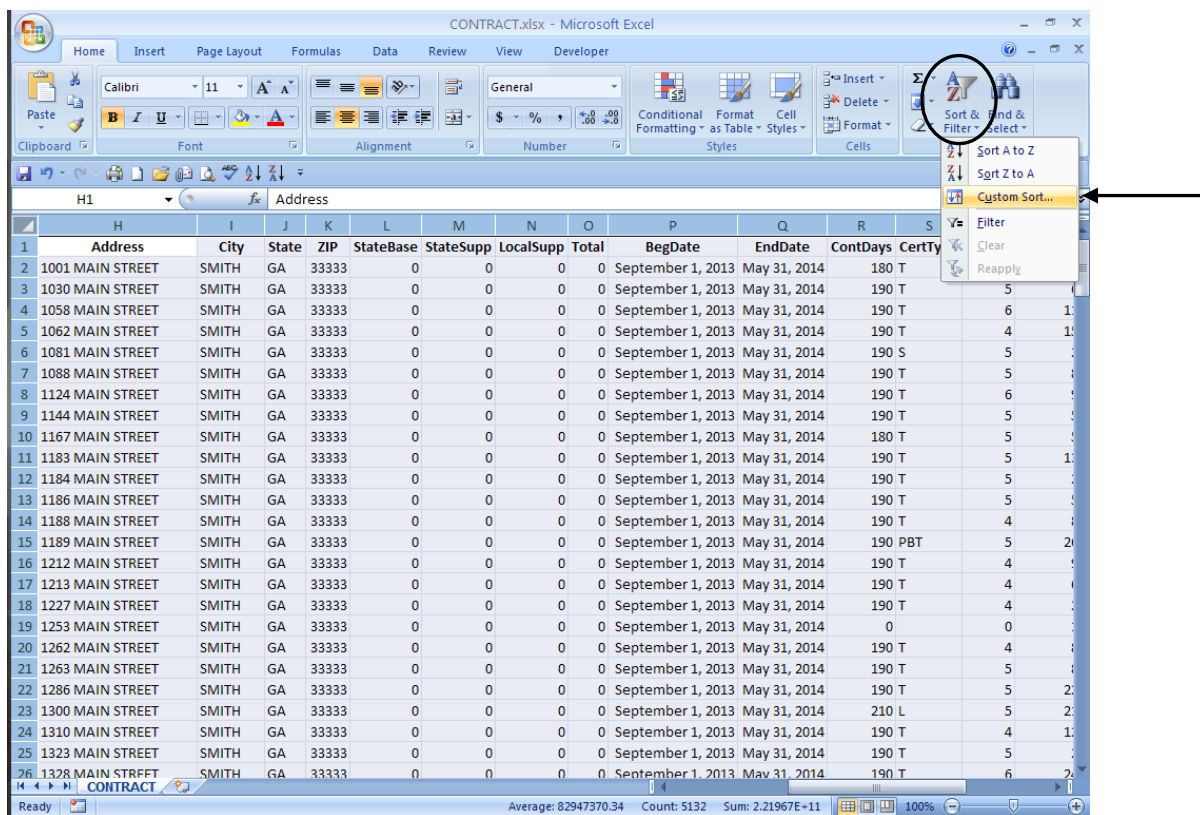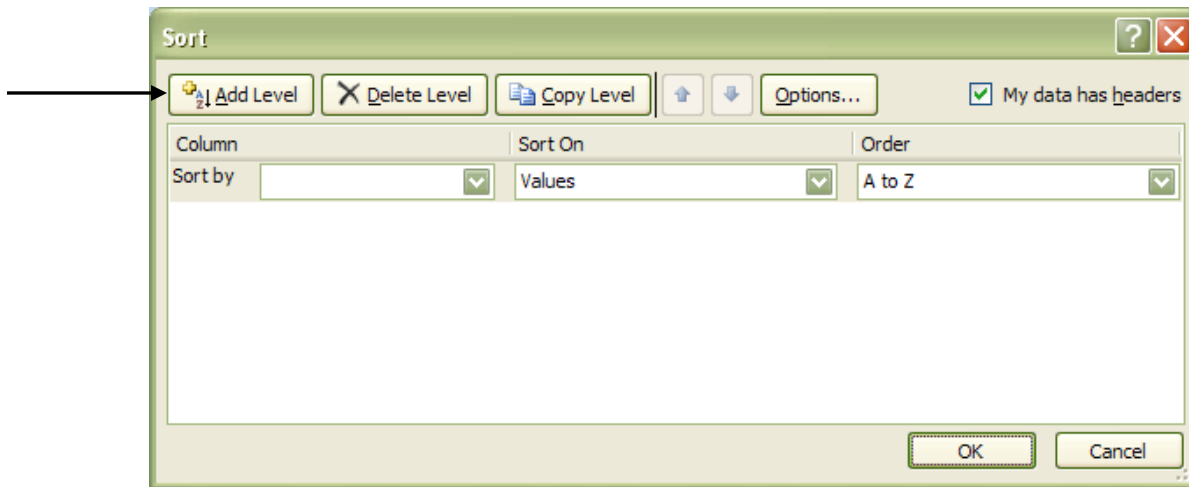| Step	Action
14	**To select the entire spreadsheet:** Position your cursor <u>above</u> **Row 1**, <u>and</u> to the <u>left of</u> your farthest left column.
15	With the entire spreadsheet selected, and within the **Cells** section of the *Options Ribbon,* select **Format → Autofit Column Width**.

The following window displays:
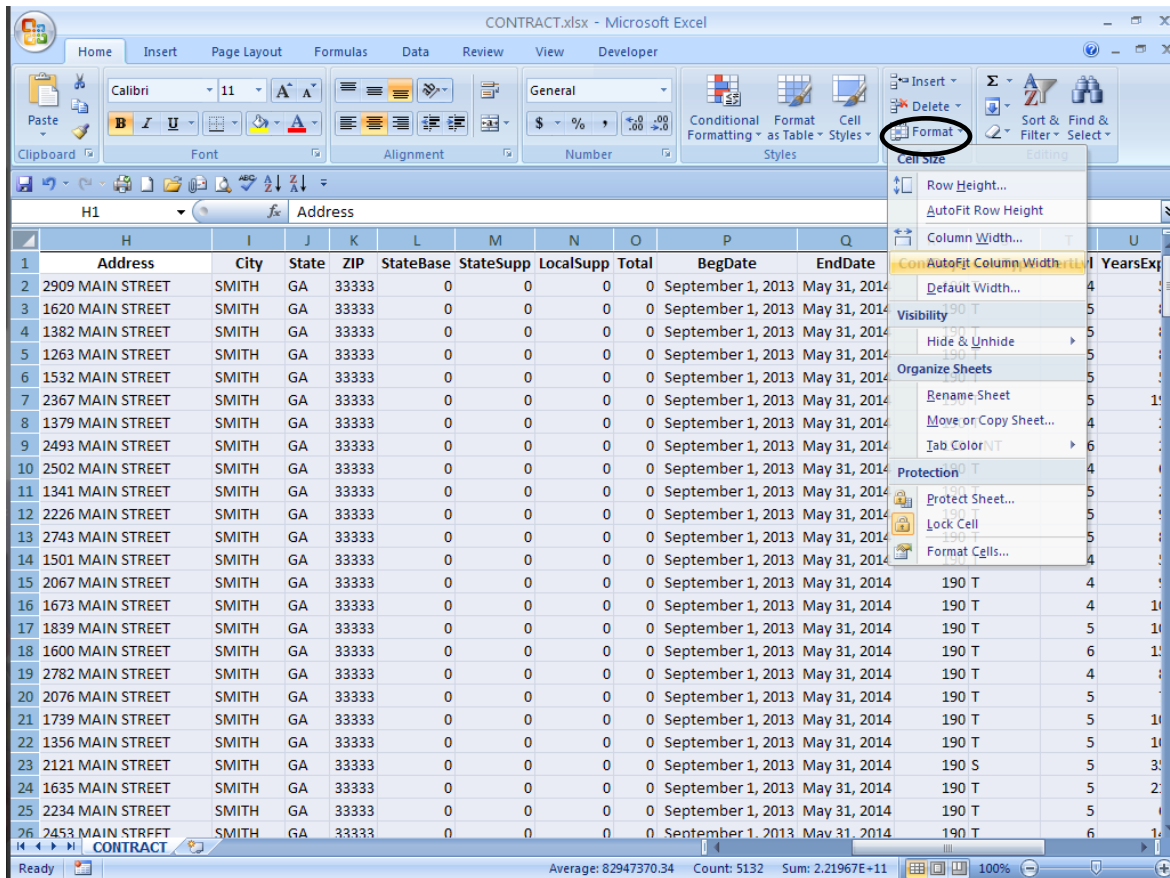
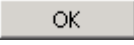| Step	Action
16	Validate, and where appropriate, update <u>all</u> employees' fields.

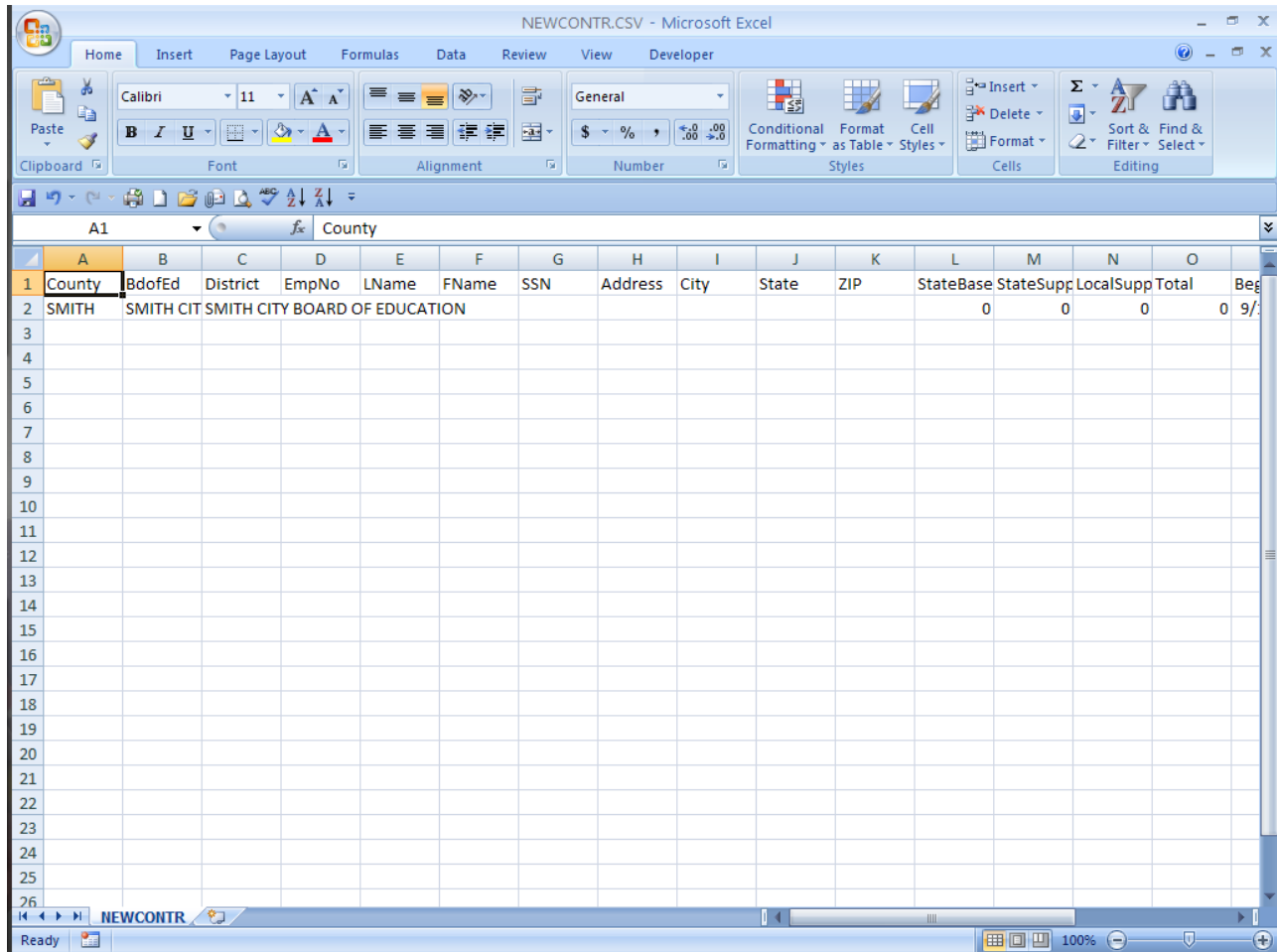| Step	Action
17	Make the appropriate modifications and additions to your employees' contract information in the Microsoft® Excel spreadsheet. *The employee's contract information will appear on the employees' contracts <u>exactly</u> as it appears on the Microsoft® Excel spreadsheet. Although this information will be exported by Employee Number, you may select a different sort order in Microsoft® Excel, such as by FacilityName, and then by Employee Name.*
18	With the entire spreadsheet selected, within the **Editing** section of the *Options Ribbon,* select **Sort & Filter → Custom Sort**.

The following window displays:

When *Custom Sort* is selected, the following dialog box displays:

Step	Action
19	Continue to select **Add Level** until the following have been added to the dialog box: • **Sort by: FacilityName** • **First Then by: LName** (Last Name) • **Second Then by: FName** (First Name)
20	Select **Values** as the **Sort on** criteria, and **A to Z** as the **Order** for each of the sort criteria selections.
21	Ensure **My data has headers** is selected.
22	Select ⬚ OK ⬚ (**OK**).
23	After all changes and additions have been made, select 🖫 (**Save**).
24	**To create contracts for new employees:** Open the **NEWCONTR.csv** file:

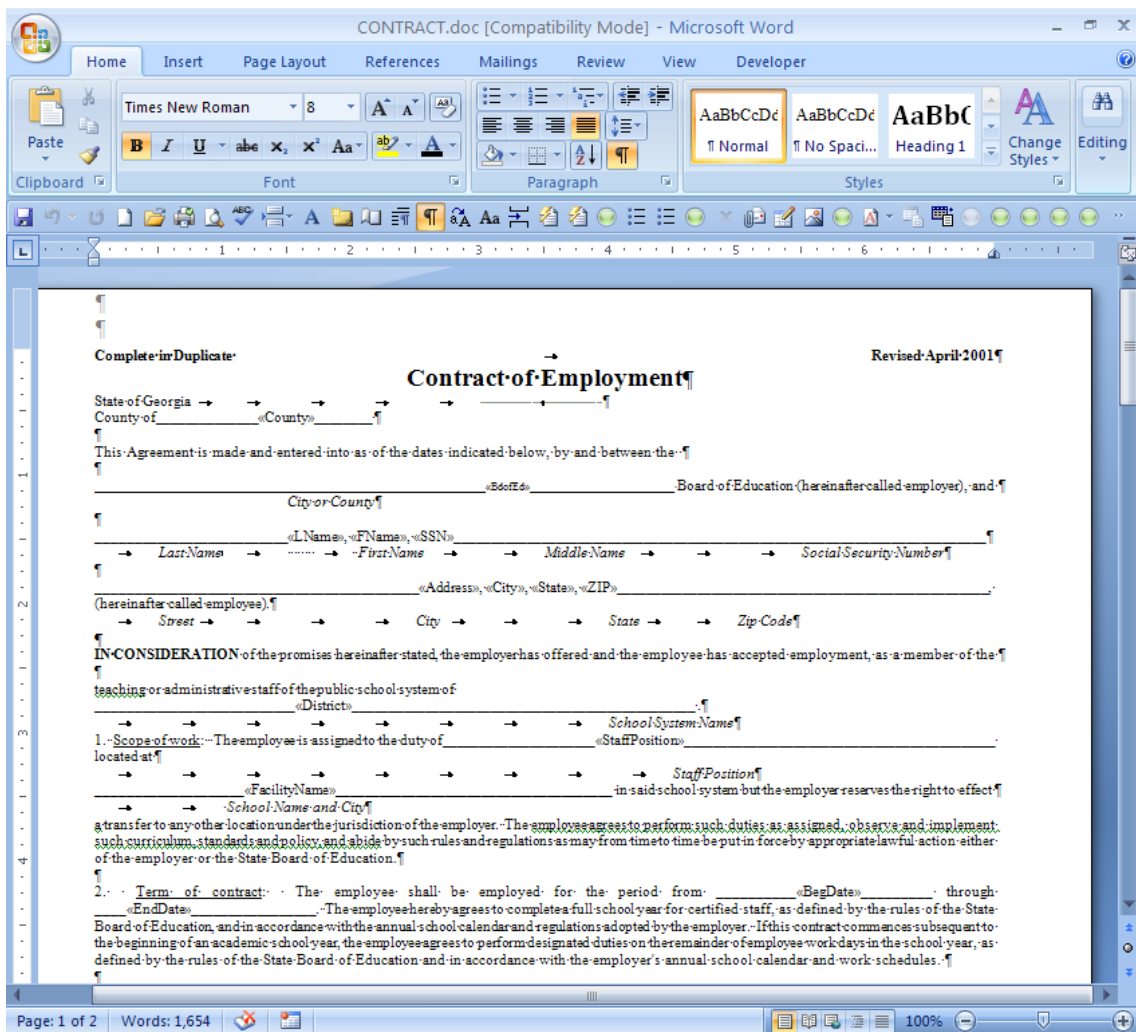The following window displays:

Step	Action
25	Since the *NEWCONTR.csv* file contains information in only one record, copy the defaulting information, for example *County, Board of Ed*, etc., into the remaining rows.
26	Manually enter your new employees' contract information into the Microsoft® Excel spreadsheet.
27	Repeat *Steps 4 – 26* for the **NEWCONTR.csv** file.
28	After all changes and additions have been made, save the file as **NEWCONTR.xls**.
29	Proceed to *Procedure D: Microsoft® Word Contract File Processing*.

Procedure D: Microsoft® Word Contract File Processing

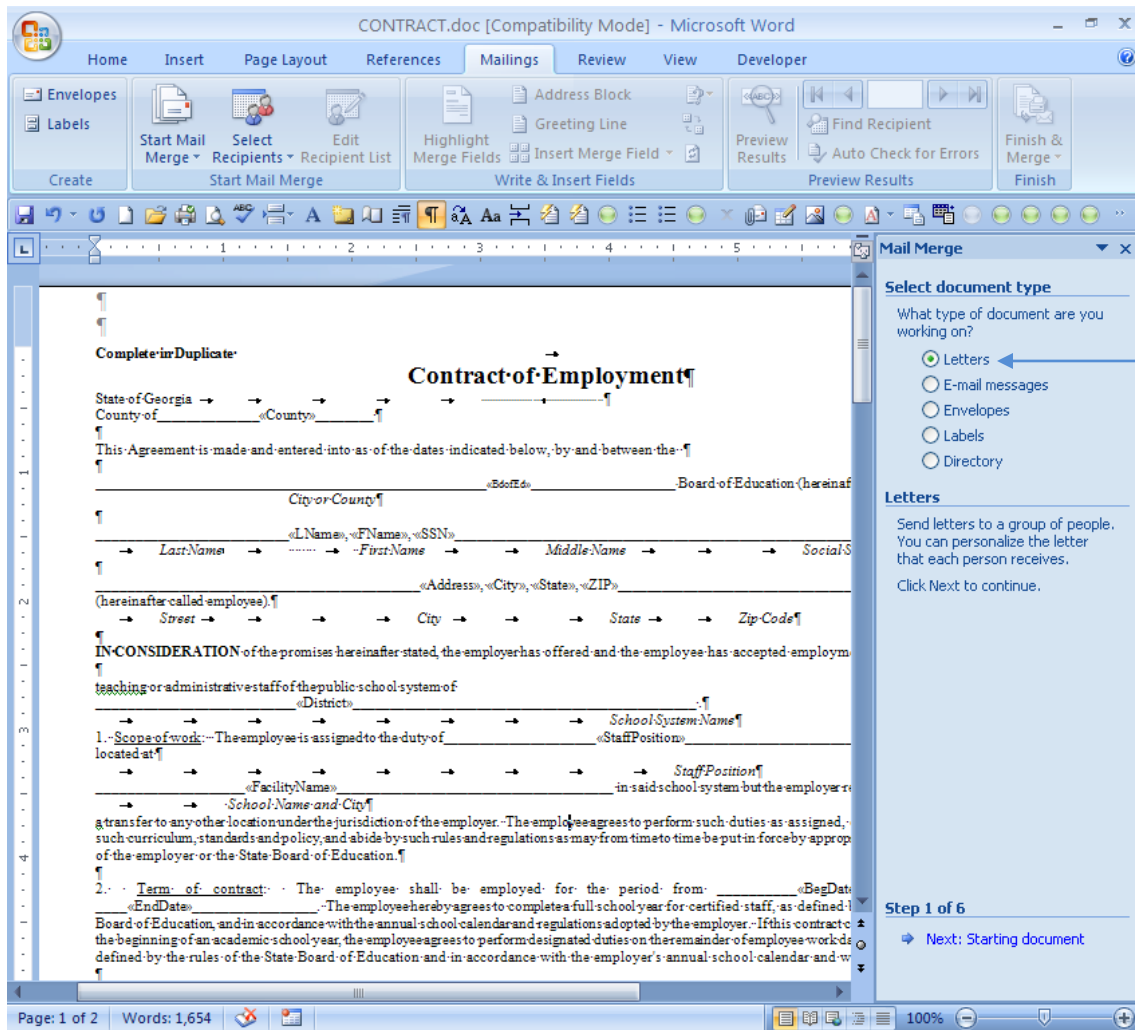| Step	Action
1	Open the **CONTRACT.doc** file.
	The CONTRACT.doc file is located in K:\SECOND\PERDATA.
	The CONTRACT.doc file's field names, for example, <<County>>, <<District>>, <<BdofEd>>, <<FName>>, <<LName>>, etc., were imported from the Microsoft® Excel spreadsheet discussed in Procedure C: Microsoft® Excel Contract File Processing.

The following window displays:

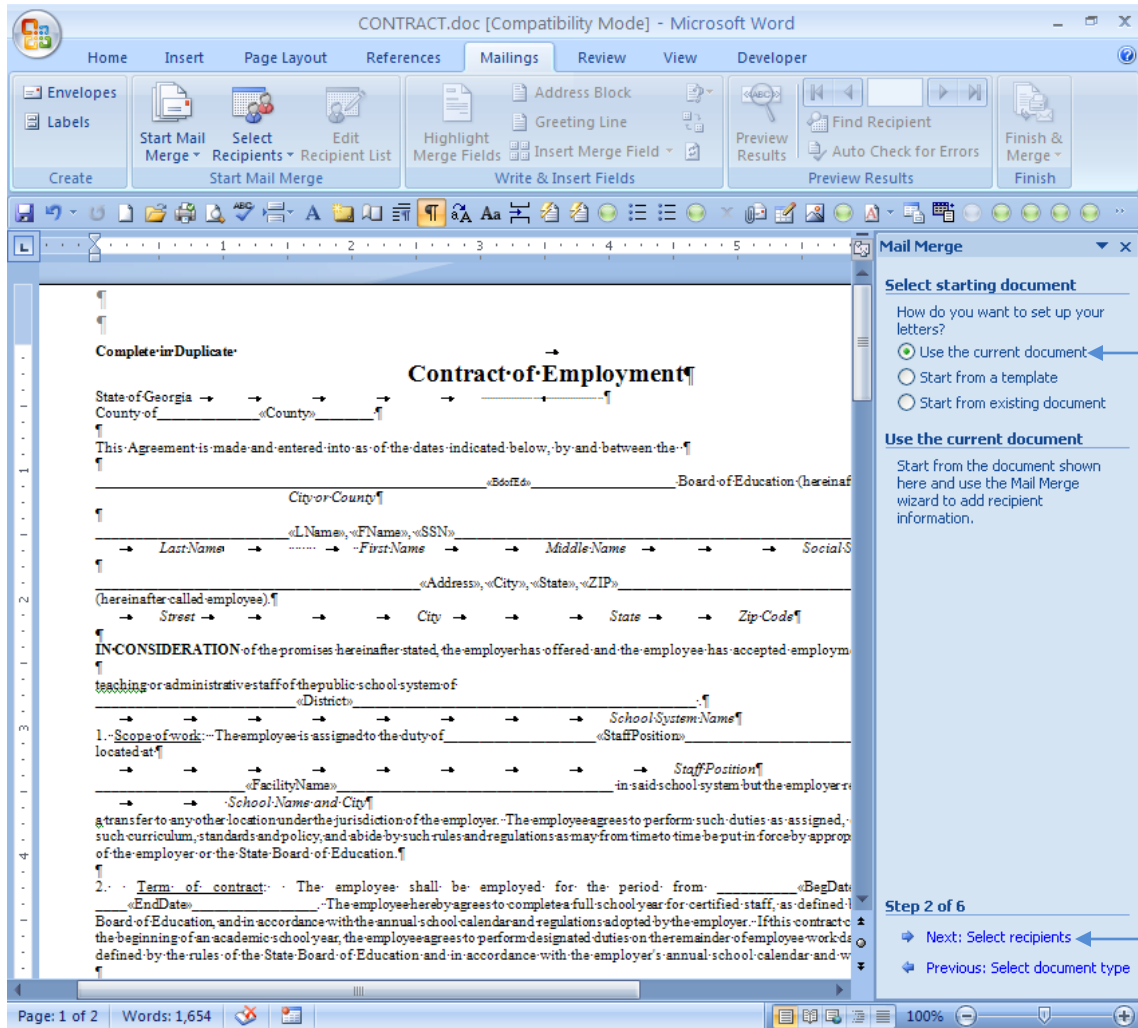| Step	Action
2	Select the **Mailings** tab, and within the *Ribbon,* select **Step by Step Mail Merge Wizard.** *The Mail Merge panel displays in the right portion of the screen.*

The following window displays:

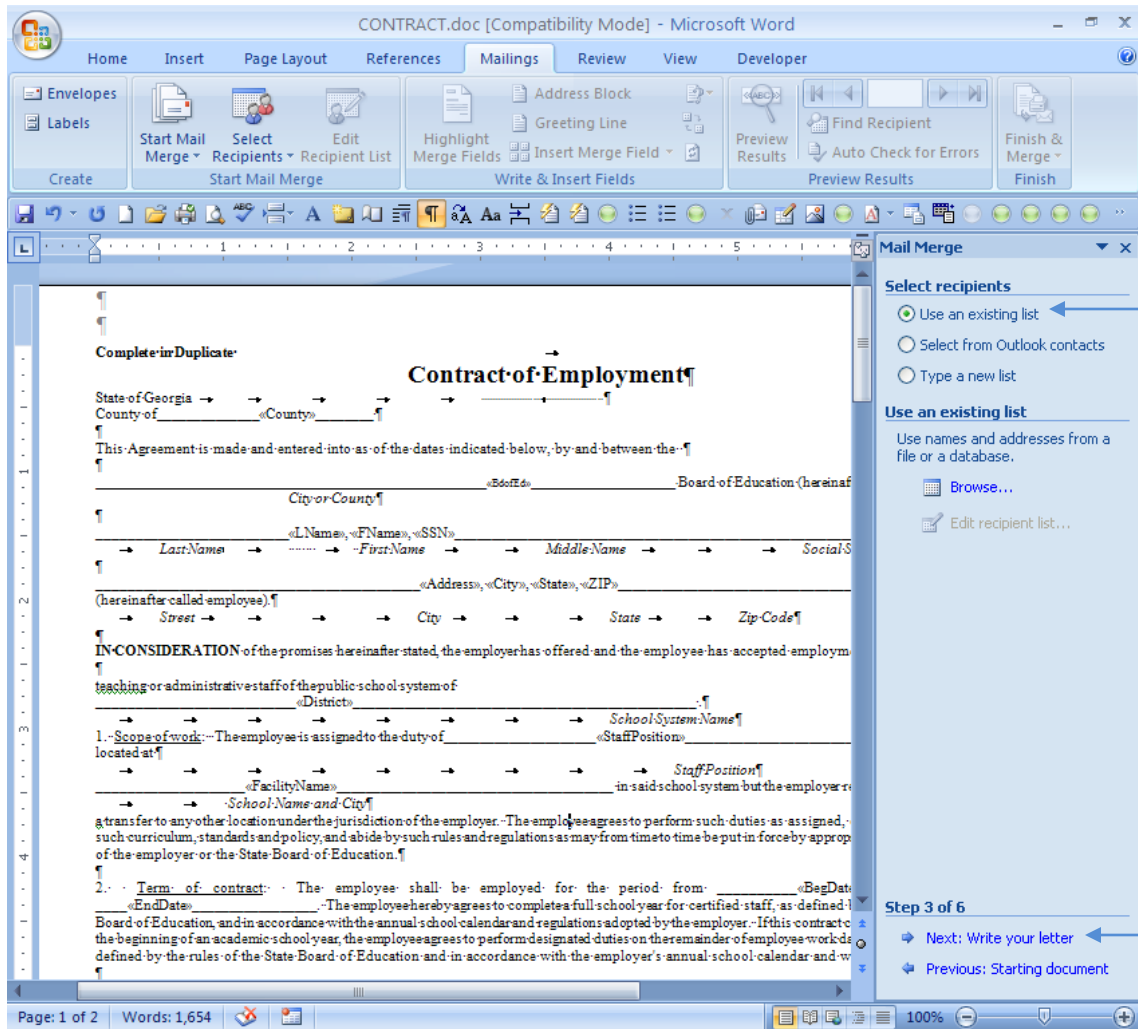| Step	Action
3	**Step 1 of 6:** Ensure **Letters** is selected, and choose **Next: Starting document** in the lower right corner of the page.

The following window displays:
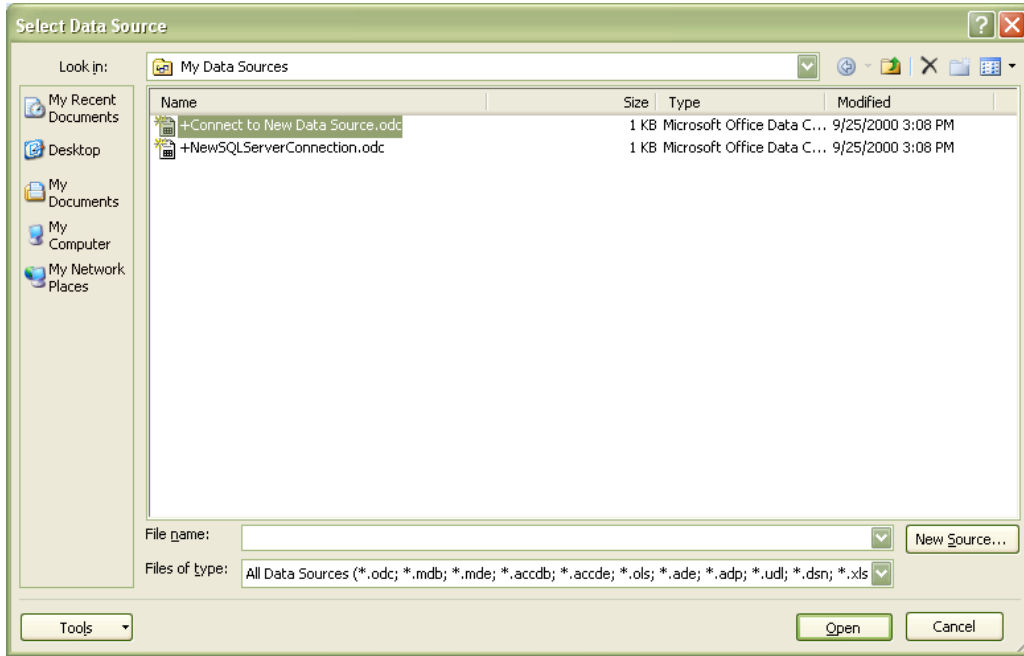

Step	Action
4	**Step 2 of 6:** Ensure **Use the current document** is selected, and choose **Next: Select recipients** in the lower right corner of the page.

The following window displays:

Step	Action
5	Ensure **Use an existing list** is selected, and choose **Browse** (Select recipient list file).

The following dialog box displays:

Step	Action
6	Navigate to **K:\SECOND\PERDATA** to select the CONTRACT.xls (CONTRACT.xlsx) file saved in *Procedure C: Microsoft® Excel Contract File Processing*.

The following dialog box displays:
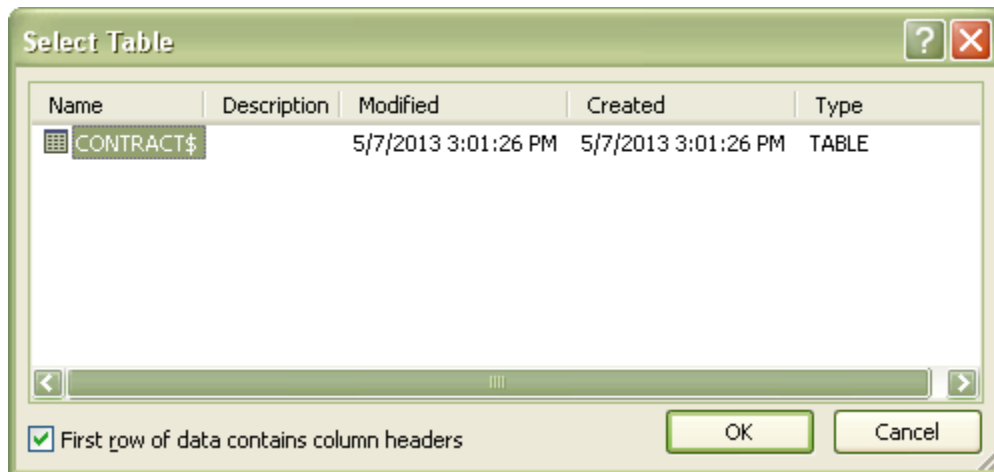
Step	Action
7	Ensure **First row of data contains column headers** is selected, and choose **OK**.

The following dialog box displays:
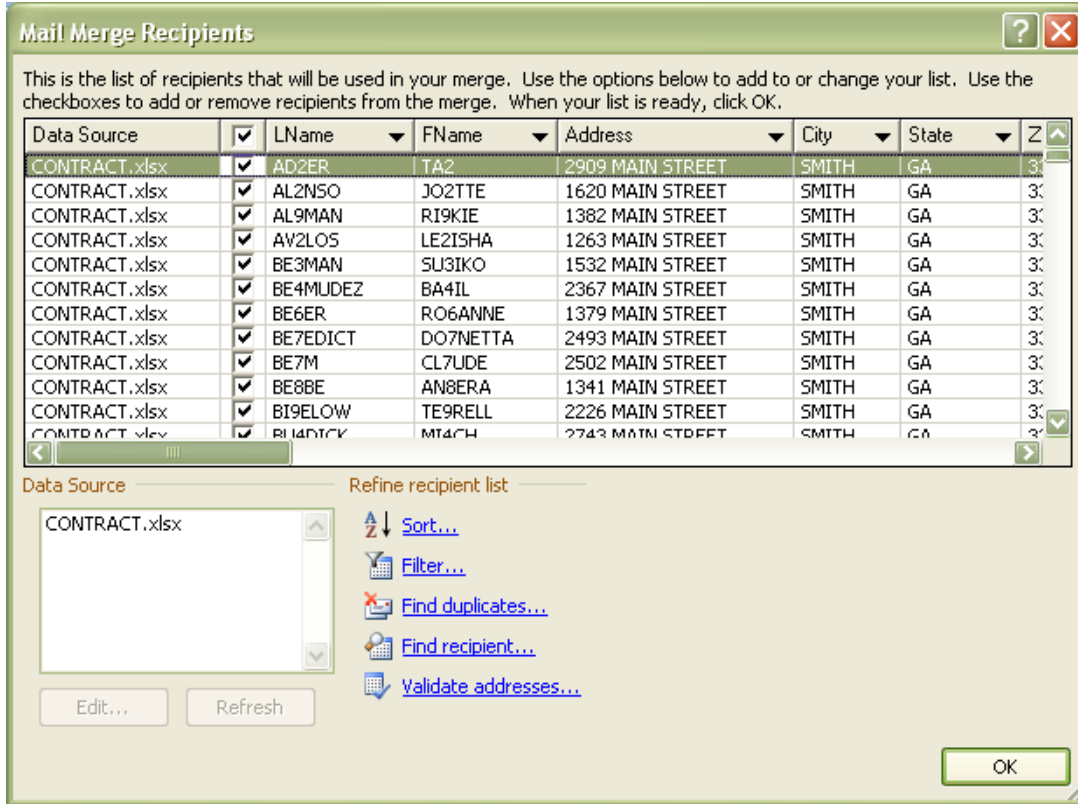
Step	Action
8	Select **OK**.

The following window displays:
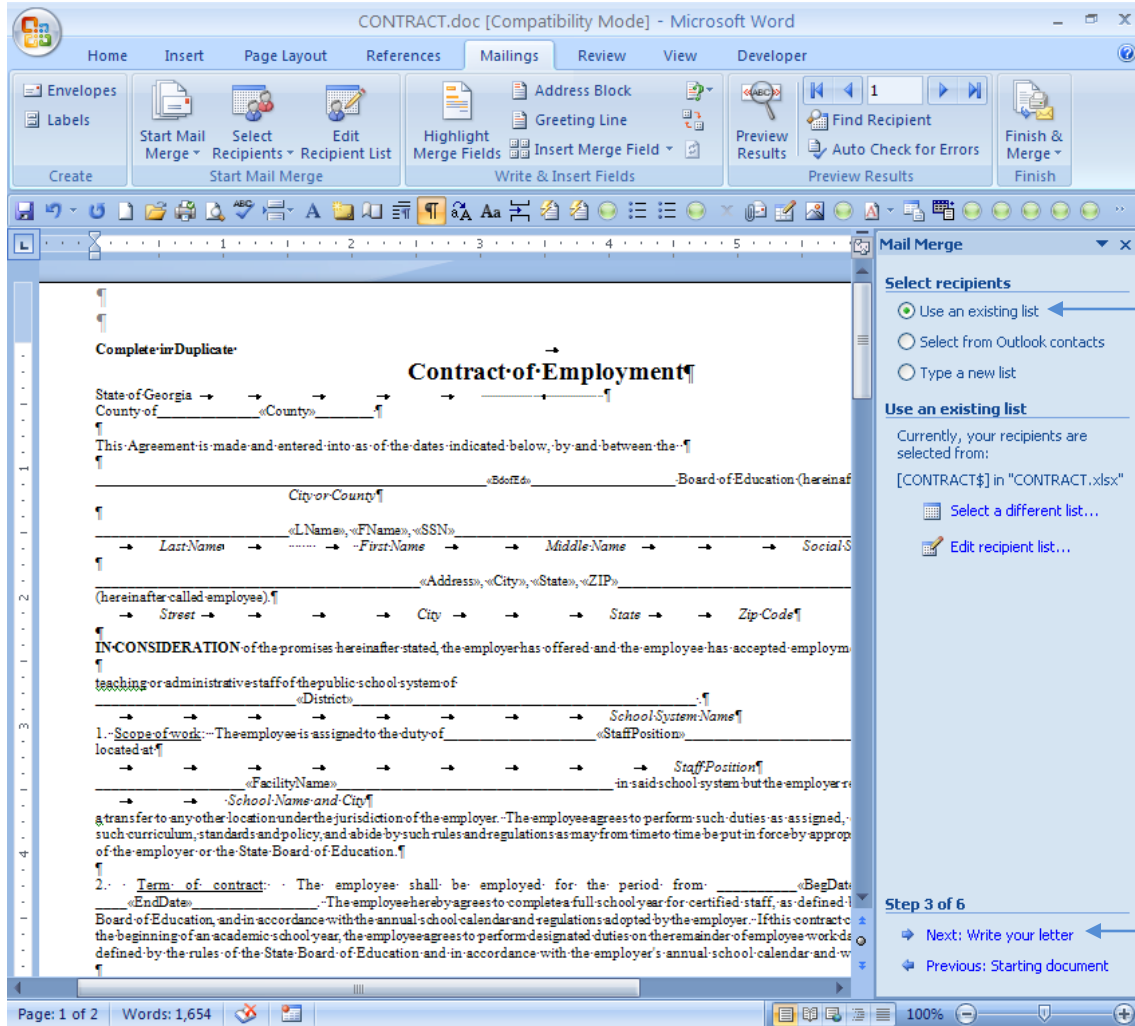
Step	Action
9	**Step 3 of 6:** Choose **Next: Write your letter**.

The following window displays:
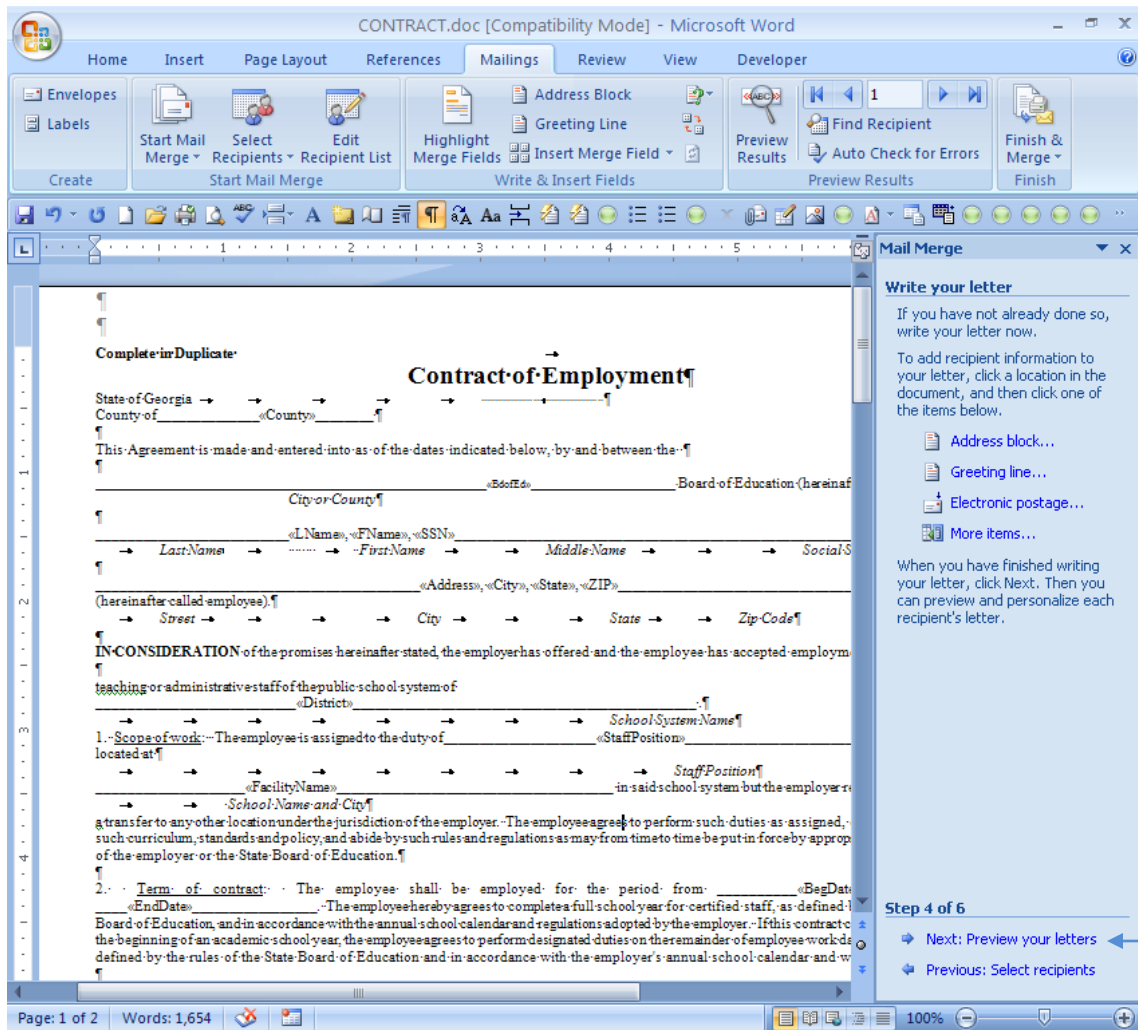
Step	Action
10	**Step 4 of 6:** Choose **Preview your letters** in the lower right corner of the page.

The following window displays:
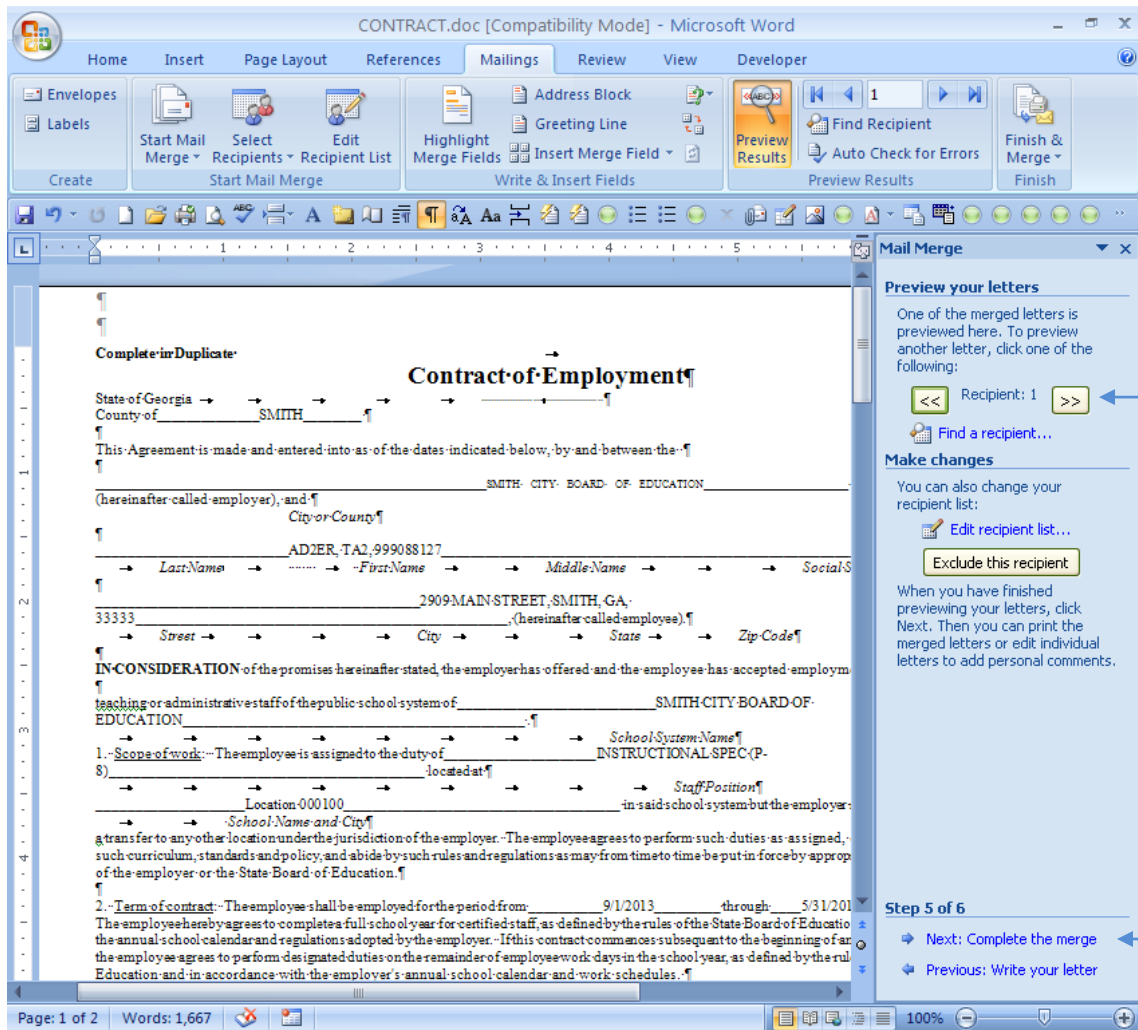
Step	Action
11	**Step 5 of 6:** Choose **Next: Complete the merge** in the lower right corner of the page.

The following window displays:
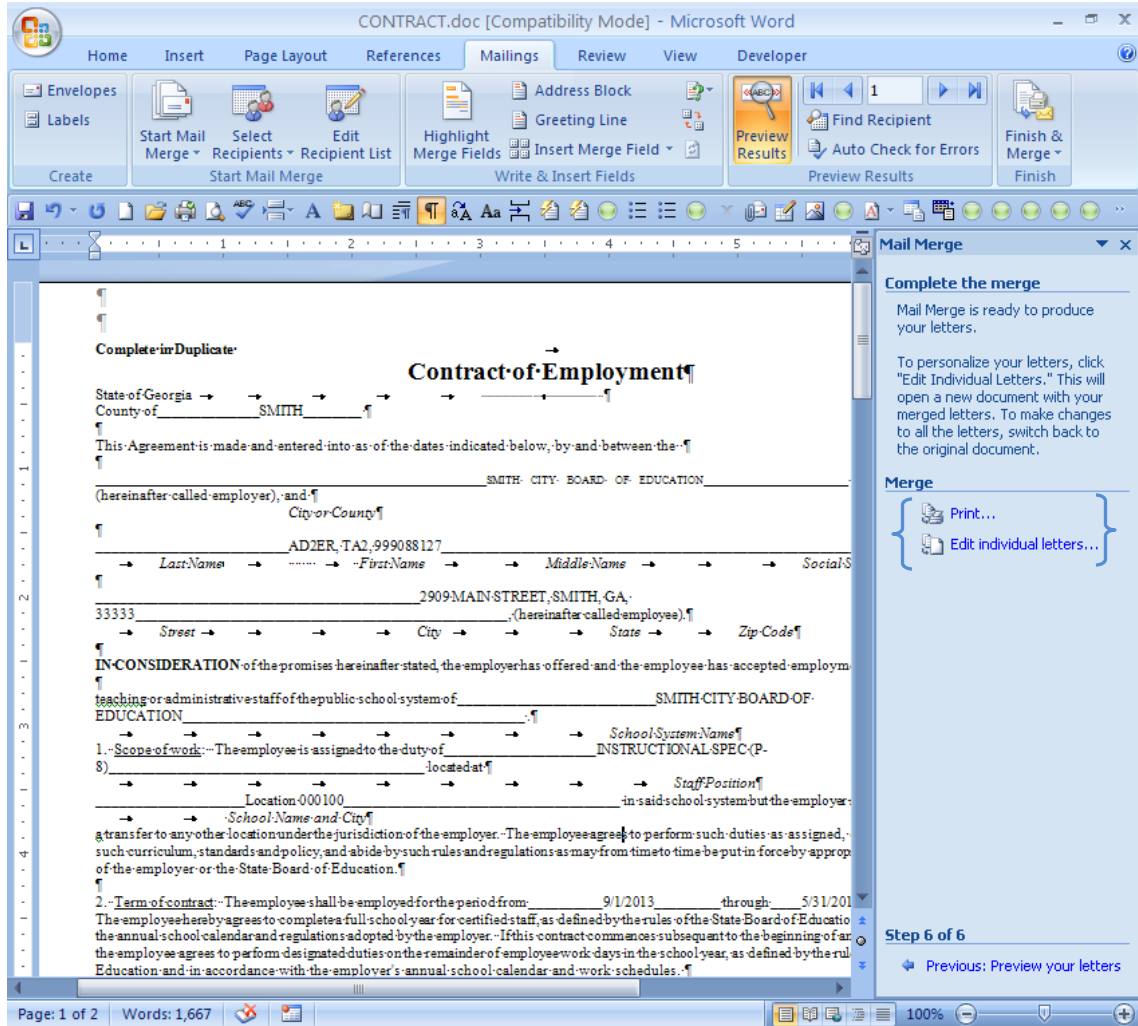
Step	Action
12	**Step 6 of 6** – Select **Edit individual letters** to review the contracts before they are printed.
13	When the review is complete, select the **Print** option to print the employees' contracts.

Appendix A: Contract of Employment - Example

The following is a screenshot of a Microsoft Word document (CONTRACT.doc in Compatibility Mode). The document content reads:

PUBLIC SCHOOL EMPLOYMENT OATH OF ALLEGIANCE

State of Georgia

County of _____

I, _____, a citizen of _____ and being an employee

of _____ and the recipient of public funds for services rendered as such employee,

do hereby solemnly swear and affirm that I will support the Constitution of the United States and the Constitution of Georgia.

_____
Signature of Employee

Sworn to and subscribed before me this _____ day of _____, 20_____.

_____
Notary Public

Required by O.C.G.A. 45-3-11☼

Addendum to Contract of Employment

State of Georgia
County of _____

This Addendum is made and entered into this _____ day of _____, 20_____